GlobalSign Partners

Digital Certificate Reseller Quick Start Guide

Using your GCC Partner Account
to Resell SSL & Client Certificates Effectively

v2.4

GlobalSign

TABLE OF CONTENTS

Logging In 4
Available Products 4
SSL Certificates 4
OneClickSSL Vouchers 4
Client Certificates 4
Pricing, Payment Options & Billing 5
Discount Structure & Getting The Best Discounts 5
Payment Options – Pay As You Go 6
Unlimited Licensing 6
Pay As You Go - Payment by Credit Card 6
Pay As You Go - Payment by Monthly Invoicing 6
Pay As You Go - Payment Upfront 6
Payment Options – Bulk Orders / Depositing Funds into Account 6
Create Bulk Order 7
Add Deposit 7
How to Pay for your Bulk Order / Add Deposit Amount 7
Ordering SSL Certificates 8
Complete a Full Application 8
Adding Subject Alternative Names (SANs) 11
Using OneClickSSL 12
Types of OneClickSSL Vouchers 12
Payment for OneClickSSL Vouchers 13
Obtaining a OneClickSSL Single Site Voucher 13
Initiate a Cert-Invite 14
Managing Existing Customers: SSL Certificate Applications 14
Viewing Outstanding & Completed Orders 14
Cancelling a Cert-Invite PIN 15
Cancelling an Order 15
Resending an Approver Email 15
Reissuing an SSL Certificate 16
Renewing an SSL Certificate 16
Revoking an SSL or Client Certificate 17

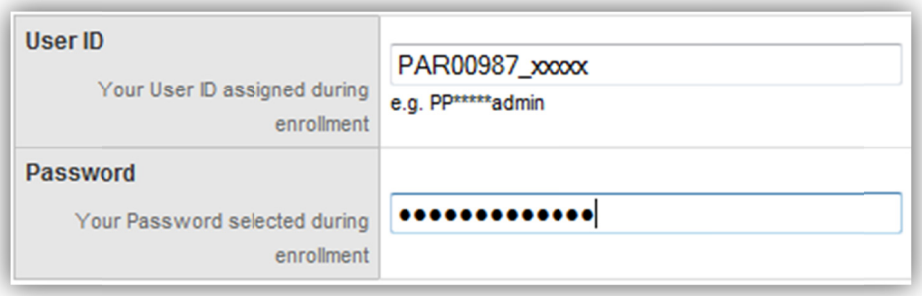
Ordering Client Certificates 17
1a) Method – Allowing Customers to Order Directly 18
1b) Method - Ordering on Behalf of a Customer 20
Essential Workflow Points to Note 22
Managing Existing Customers: Client Certificate Applications 22
Viewing Outstanding & Completed Orders 22
Cancelling an Order 23
Resending an Approver Email for Appropriate Client Certificates 23
Reissuing a Client Certificate 24
Renewing a Client Certificate 24
Account wide Functions 24
Creating / Managing Users 24
User Roles 24
Creating New Users and Understanding User Administration Rights 25
GlobalSign SSL API 25
Creating Second Tier Sub-Resellers 25
Getting Help 25

LOGGING IN

Once your Partner Account has been approved, you can log into the GlobalSign Certificate Center (GCC) and start reselling GlobalSign SSL and Client Certificates straight away.

Go to www.globalsign.com and click Log In.

Enter your User ID and Password. Your User ID is the *PARXXXX_xxxxx* number given to you at the end of the Partner Signup; you can also find it in your Welcome Email. Your Password is the password you entered during the Partner Signup.



If you have difficulties logging in, or forget your password please contact Support at: www.globalsign.com/support.

AVAILABLE PRODUCTS

SSL CERTIFICATES

SSL Certificates encrypt the connection between server and browser, or between web services using https. Reselling SSL is ideal for any company providing web services such as hosting, ecommerce services, domain sales etc. For more details on SSL visit www.globalsign.com/ssl

ONECLICKSSL VOUCHERS

OneClickSSL Vouchers can be redeemed by OneClickSSL plug-ins for cPanel, Parallels Plesk, IIS and Apache. OneClickSSL enables hosting companies to replace the traditional SSL lifecycle process with a fully automated and significantly simplified SSL activation process. More details are available at http://www.globalsign.com/ssl/oneclickssl/

CLIENT CERTIFICATES

Client Certificates are the group name given to Digital Certificates issued to people or companies for the specific use of email security, authentication to online resources and application of digital signatures to applications (code) and electronic documents (Adobe PDF and Microsoft Office files). For more details on Client Certificates please visit:

- PersonalSign Digital IDs for email signing and encryption, two factor authentication, and digital signatures for Microsoft Office documents
  www.globalsign.com/personalsign/

- Code Signing Digital IDs for application signing
  www.globalsign.com/code-signing/

- PDF Signing Certificate for Adobe PDF signing
  www.globalsign.com/pdf-signing/

PRICING, PAYMENT OPTIONS & BILLING

DISCOUNT STRUCTURE & GETTING THE BEST DISCOUNTS

All Partners buy GlobalSign Digital Certificates at a discount. You can resell the certificates to your customers through your own website or web services at your desired price and make margin on every certificate you sell. Alternatively you could add certificates as a value added offering to your current product packages. The higher you sell the certificate or the higher your discount, the more margin you make.

The discount levels are set by the level of funds put into your Account. All Partners initially have the default level of discount, detailed as Rank 1 in the example table below, and receive this discounted pricing every time they purchase a certificate using the Pay As You Go (no commitment to methods of payment – see Payment Options – Pay As You Go section of this Quick Start Guide). This means you can buy at a discount without committing any funds to your account, however in order to **obtain higher discounts you must bulk purchase / deposit funds** directly into your account.

Discount levels displayed are discounts of standard Pay As You Go pricing and not the SRP (Standard Retail Price) of GlobalSign SSL. For the SRP of the SSL Certificates you are reselling please visit the SSL Certificates section of your regional GlobalSign website.

Rank	PAYG pricing	Bulk purchase pricing	Discount off PAYG pricing
1	$180.00	$180.00	0%
2	$900.00	$785.00	12%
3	$1,800.00	$1,250.00	30%
4	$3,600.00	$2,400.00	33%
5	$7,200.00	$4,400.00	38%

Example discount pricing. Actual pricing may vary.

Rank 1 is standard Pay As You Go pricing – the base discount level. In this example, to progress to Rank 2 you would need to add $785 to your account, thereby automatically giving you a 12% discount over the standard PAYG pricing. Once you've created bulk contracts / deposited enough funds to elevate you to a higher Rank, you stay on that rank for a 12 month period. If you create any further bulk contracts / deposit additional funds during the 12 month period, the discount period

is automatically extended by 12 months. In other words, as long as you create bulk contracts / deposit additional funds before the 12 month period expires, you will maintain your current discount rank.

The process of upgrading your rank (and hence discount) is automatic (alternatively contact your Account Manager) and can be completed from within your account as described in the Payment Options – Bulk Orders / Depositing Funds into Account section of this Quick Start Guide.

PAYMENT OPTIONS – PAY AS YOU GO

You may choose to use Unlimited Licensing, Pay As You Go (PAYG) each time you purchase a certificate. When using PAYG you will only receive Rank 1 discount levels. You have the option to pay in one of three ways – Credit Card, Bank Transfer (monthly invoicing in arrears) or Bank Transfer (payment upfront).

UNLIMITED LICENSING

This option allows the reseller to resell an unlimited number of certificates during the term of the agreement. Unlimited Licensing is only available by speaking directly to your Account Manager.

PAY AS YOU GO - PAYMENT BY CREDIT CARD

Each certificate is paid for by Credit Card (in real time) at the point of the certificate being issued. If you want to use Credit Card PAYG to buy a certificate make sure to select **Credit Card** as the **Payment Option** at the payment point when ordering certificates. Note: you receive PAYG pricing (Rank 1) when buying certificates using this method.

PAY AS YOU GO - PAYMENT BY MONTHLY INVOICING

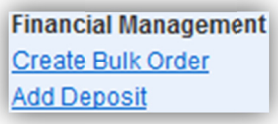
GlobalSign awards you a credit level as agreed with your Account Manager and you can buy as many certificates using the credit you have on account. At the end of the month GlobalSign will invoice you for all certificates issued during the calendar month. If you wish to be invoiced monthly select **Bank Transfer – Payment in Arrears** as the **Payment Option** at the payment point when ordering certificates. Note: you receive PAYG pricing (Rank 1) when buying certificates using this method.

PAY AS YOU GO - PAYMENT UPFRONT

GlobalSign will only add the deposit amount funds to the account once the funds are transferred by your purchasing department directly to the GlobalSign bank account. Note: you receive PAYG pricing **(**Rank 1) when buying certificates using this method.

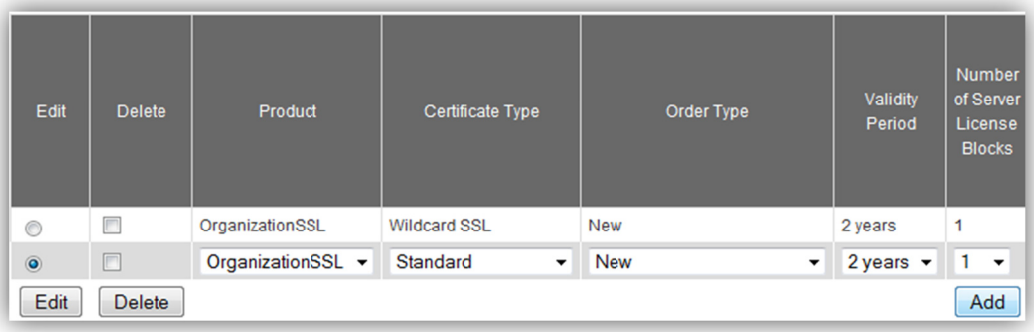
PAYMENT OPTIONS – BULK ORDERS / DEPOSITING FUNDS INTO ACCOUNT

Using the Deposit Funds option gives you the best discounts. To be able to pay for certificates using deposited funds you must first deposit funds into your account by clicking **Create Bulk Order** or **Add Deposit** in the **Financial Management** section:



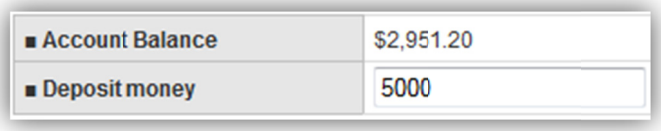
CREATE BULK ORDER

This section allows to you add the exact funds required for a particular order. Click **Create Bulk Order** under **Financial Management** and select the product, validity period, and options and click **Add**. Repeat until you have added all the products you require for a particular order. As you add products the total Deposit needed will be added up. If the total Deposit needed exceeds a Rank Level, you will be promoted to the next Rank Level where you will enjoy higher discounts.



ADD DEPOSIT

Click **Add Deposit** under **Financial Management** and enter the specific amount of funds you wish to add to your account. If the total Deposit needed exceeds a Rank Level, you will be promoted to the next Rank Level where you will enjoy higher discounts.



HOW TO PAY FOR YOUR BULK ORDER / ADD DEPOSIT AMOUNT

Complete either a **Create Bulk Order** or **Add Deposit** as detailed above and click **Purchase** to add the funds to your account. You have the choice of three payment types to settle the deposit amount.

- **Bank Transfer – Advanced Payment**
  Select for an invoice to automatically appear in the **Accounting / Billing** > **View / Request Invoices** section that can be printed and submitted to your purchasing department. GlobalSign will only add the deposit amount funds to the account once the funds are transferred by your purchasing department directly to the GlobalSign bank account.

- **Bank Transfer – Post Payment (PO Payment)**
  Select to request the deposit amount funds are settled within the standard payment terms. GlobalSign must authorize the credit level (deposit amount funds) before the funds can be used. At the end of the calendar month an invoice will automatically appear in the **Accounting / Billing** > **View / Request Invoices** section.

- **Credit Card**

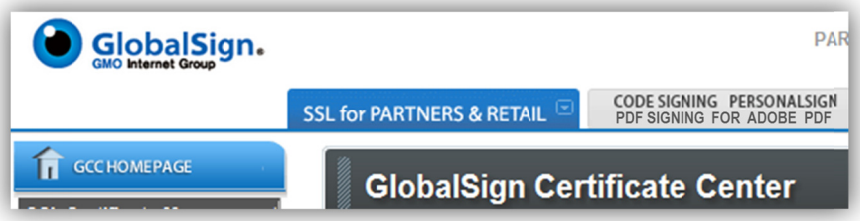
You will be asked to provide credit card details to be charged before the Deposit amount is added. The credit card is charged immediately.

When buying certificates using the funds you have deposited, make sure to select **Deposit** as the **Payment Option** at the payment point when ordering certificates.

ORDERING SSL CERTIFICATES

When you are ready to order an SSL Certificate on behalf of a customer you have two methods of placing an order. You can place the order yourself by completing a full application or you can create a Cert-Invite.

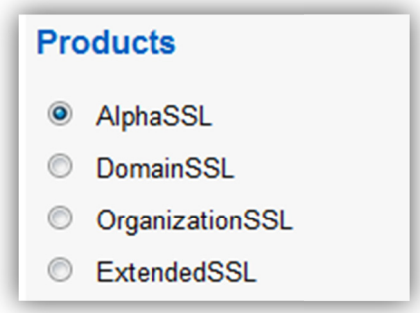
Make sure that you are in the SSL Reseller section by clicking the **SSL for Partners & Retail** Tab on your GCC landing page:



COMPLETE A FULL APPLICATION

This method requires you to enter all the information needed to issue the SSL Certificate, including the CSR and company information.

1. Click **Buy New Certificate** on the landing page dashboard.
2. On the Certificate **Application** page specify the order details:
    a. In **Products**, select the SSL Certificate type – AlphaSSL, DomainSSL, OrganizationSSL or ExtendedSSL.



    b. If you have any promotional codes from GlobalSign, enter them next.
    c. Specify if the SSL Certificate is Single Domain or will any Wildcard SSL (AlphaSSL, DomainSSL or OrganizationSSL only) or Public IP options (OrganizationSSL only).
    d. Specify the validity period – 1-5 years for AlphaSSL, DomainSSL and OrganizationSSL and 1-2 years for ExtendedSSL.

e. Specify whether the certificate is to have free Unified Communications support for the OWA, mail and Autodiscover subdomains (DomainSSL, OrganizationSSL, and ExtendedSSL only).

f. Specify whether the certificate is to have Subject Alternative Name (SAN) options (see below for further details on SANs) (DomainSSL, OrganizationSSL, and ExtendedSSL only).

g. Select whether you are **Switching from a Competitor**. Selecting the right option ensures you get the best deal. If you are switching from a competitor we will automatically query the site holding the competitor's certificate and add any time left on that certificate to the replacement. If we cannot automatically find the competitor's certificate online, you have the opportunity to manually copy and paste the certificate into a text box.

If you choose Yes, you may choose that 30 addition bonus days are added to the expiration date free of charge.

h. Select whether it's a **New** Certificate order or **Renewal.** If renewing you must enter the original Order Number or Certificate to help us expedite the renewal process.

Are you renewing this Certificate ?
No
Yes
Enter either the Order No. or the original Certificate you are renewing to identify the order renewal information.
Original Order No: *
e.g. CE123456780000
Original Certificate:

3. On the **Product Point of Contact for Certificate Delivery / Vetting Issues** page enter the details of the person to be associated with the order. The person entered here can receive the actual SSL Certificate and the Certificate Renewal Notices. If you have registered other Users for the account you can select the User from the drop down list and click **Auto Fill** (see section **Creating / Managing Users**) to avoid filling in this form for every order. Alternatively you can specify new contact details, for example the actual customer – but only do this if you want GlobalSign to send the SSL Certificate and Certificate Renewal Notices directly to your customer.

   - Note: GlobalSign does not include any pricing information in any communications with your end customer.

- Note: Check the box **Set Point of Contact** to have the SSL Certificate and Certificate Renewal Notices sent to User you have just specified. If you do not check this box, the SSL Certificate will only be sent to you.
- Note: You may specify an additional 2nd contact to just receive the Issued Certificate and Renewal Notices if you wish.

4. On the **Product Application CSR Entry Page** copy and paste the CSR (Certificate Signing Request) into the text box. The CSR will be decoded and you will be given the option to fix any errors manually.

Enter Certificate Signing Request (CSR)
If you have a CSR please complete the section below. If you do not have a CSR or do not know how to create one on your web server, don't worry, just choose one of the alternative methods below.
Yes, I already have a CSR and will paste it into the input box below (default)
New! I do not have a CSR, so I will use the OneClickSSL delivery method (requires use of OneClickSSL plug-in or install tool - more)
After creating your server's Certificate Signing Request (CSR) as created in Generate a CSR support files, paste the CSR in the form below. Make sure that it contains the complete header and footer "BEGIN" and "END" lines as shown in the example:
-----BEGIN NEW CERTIFICATE REQUEST-----
MIIDYTCCAsoCAQAwgYUxHjAcBgNVBAMTFXd3dy5jZXJ0YXV0aG9yaXR5LmNvbTEb
MBkGA1UECxMSVGVzY2huaWNhbCBTdXBwb3J0MRYwFAYDVQQKEw1HbG9iYWxTaWdu
IFVLMRIwEAYDVQQHEw1NYW1kc3RvbmUxDTALBgNVBAgTBEtlbnQxCzAJBgNVBAYT
AkdCMIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQDXMnVPB13EUGuj3QzVpefH
Rz4cV5jOERxZCDF39d/tYgYJTC8su3x0GVREC9T9tIwj5HKcv4WOpIrTc7+CXLgz
hgatGgNzZRiGNtlLAHIAbwTwna7FwQ3rlRZdptlOhy4AzzeWfNbqiH1eEh3WvPRb
CPbzGKmDTQqQS44tmrwmOwIDAQABoIIBmTAaBgorBgEEAYI3DQIDMQwWCjUuMS4y
NjAwLjIwewYKKwYBBAGCNwIBDjFtMGswDAYDVR0TAQH/BAIwADAOBgNVHQ8BAf8E
DQEJDwQ3MDUwDgYIKoZIhvcNAwICAgCAMA4GCCqGSIb3DQMEAgIAgDAHBgUrDgMC
BzAKBggqhkiG9w0DBzATBgNVHSUEDDAKBggrBgEFBQcDATCB/QYKKwYBBAGCNw0C
AjGB7jCB6wIBAR5aAE0AaQBjAHIAdwBiAG8AZgB0ACAAUgBTAEEAIABTAEMAaABh
AG4AbgBlAGwAIABDAHIAeQBwAHQAbwBrAHIAYQBwAGgAaQBjACAAUAByAG8AdgBp
AGQAZQByA4GJAJNJHx0pK+I2BFcmt5oIKMmmDDuOehAjWa+Am/loI4HsX4zjuasD
htaAzk2isnAHIAbwRviDwU76vuHKLU/IViUMKXPqhm/MVBE6cQqJIa4TedO/bxV6
+XbB5JrTk8JEqkp8cq7IWWHg0PIyNyhtx04McBbaPKGZ5vhPmOKLIVAAAAAAAA
AAAwDQYJKoZIhvcNAQEFBQADgYEAIggvWuAT42pOauAHIAbw00vgasOoT0bY89pt
FQ3wtEo6koZ76FDd6NnofjT4URXJDNCK9XE4c4b0hiScdhm87RqffFRJEeBT6MkP
vvK70L3n0QmgKoLW+TNfdK6OfnQauf8wSD3pvdg5rd7gWsFzKW3mYIaHz6eqiO7B
rNkWPuE=
-----END NEW CERTIFICATE REQUEST-----
Your CSR should contain EXACTLY the details that you wish for your Certificate to be issued to. Make sure the Common Name (CN) contains the fully qualified domain name you wish to secure, the Organization is your legally incorporated name including any company title such as Inc, Ltd, NV/SA etc and that your Country, State (County or Province) and Locality (City or Town) match the details for your registered company office. Providing incorrect information will cause delays in the processing of your order.

For AlphaSSL and DomainSSL you have two CSR related options:

- **Enter CSR**: copy and paste the Certificate Signing Request created on the customer's web server into the box.
- **Use OneClickSSL**: if your customer is using a OneClickSSL plug-in for cPanel, Parallels Plesk, IIS or Apache, you can use this function to create a redeemable OneClickSSL Voucher. Rather than the system providing a Certificate at the end of the application, it will provide a OneClickSSL Voucher which is mapped to a particular order.

5. If the certificate order is for a DomainSSL you will be taken to the **Approver Email** page. Select the most appropriate email address that GlobalSign can send the Approver Email. This email is sent to the WHOIS domain contact or one of the generic email addresses used by domain administrators. The email contains a link to "Approve" the application, and unless the link is followed and the I APPROVE button is clicked, the Certificate will not be issued. Note: if you do not see an appropriate email address, select any and then contact Support for advice on how best to continue.

6. If the certificate order is for OrganizationSSL you will be taken to the **OrganizationSSL Application Seal Profile Information Entry** page. This page captures the company details of the customer (not you the reseller) and will be vetted by the appropriate regional GlobalSign vetting team. Ensure you enter accurate information to avoid delays in the vetting process.

7. Choose your payment method:
    a. **Deposit –** the fee for the certificate will be deducted from your Deposit balance (see the Payment Options – Bulk Orders / Depositing Funds into Account section of this Quick Start Guide).

    Alternatively you may use one of the Pay As You Go payment methods (see the Payment Options – Pay As You Go section of this Quick Start Guide):

    b. **Bank Transfer –**
        i. **Payment in Advance**: Select for an invoice to automatically appear in the **Accounting / Billing > View / Request Invoices** section that can be printed and submitted to your purchasing department. GlobalSign will only issue the certificate once the funds are transferred by your purchasing department directly to the GlobalSign bank account.
        ii. **Payment in Arrears**: Select to request the deposit amount funds are settled within the standard payment terms. At the end of the calendar month an invoice will automatically appear in the **Accounting / Billing** > **View / Request Invoices** section. Once you have settled the invoice your credit limit will return to the previous limit level.

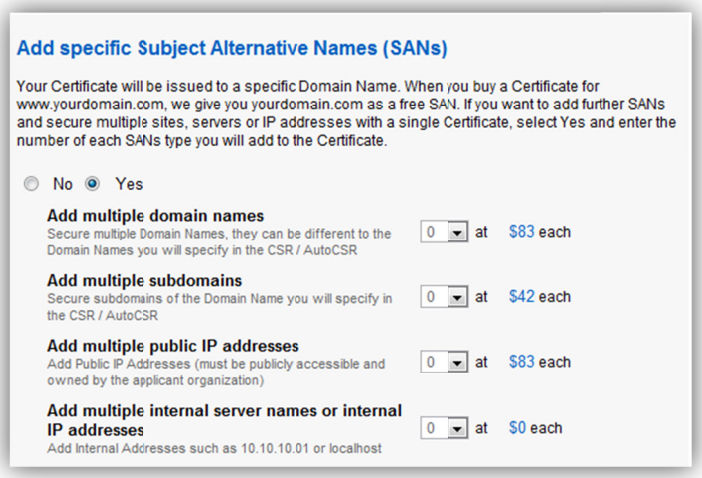
    c. **Credit Card** – you will be asked to provide credit card details to be charged before the certificate can be issued. The credit card is charged automatically at the point of issuance.

    Note: depending on your territory and account type, not all payment types will be available.

ADDING SUBJECT ALTERNATIVE NAMES (SANS)

Standard SSL Certificates secure a single Fully Qualified Domain Name. By adding SANs a single certificate can secure other server "names" such as other domain names, subdomains, IP addresses and local host names. If selected you will enter the SANs on the SANs page and the total cost of the certificate is then calculated. You may specify up to 40 SANs per certificate. The types of SANs allowed depends on the certificate type:

- **DomainSSL** - Unified Communications option or Subdomains
- **OrganizationSSL** - Unified Communications option, Subdomains, Internal Hostnames or Internal IP Addresses, different Fully Qualified Domain Names and Public IP Addresses.
- **ExtendedSSL** - Unified Communications option, Subdomains, and different Fully Qualified Domain Names.


Add specific Subject Alternative Names (SANs)
Your Certificate will be issued to a specific Domain Name. When you buy a Certificate for www.yourdomain.com, we give you yourdomain.com as a free SAN. If you want to add further SANs and secure multiple sites, servers or IP addresses with a single Certificate, select Yes and enter the number of each SANs type you will add to the Certificate.
No
Yes
Add multiple domain names
Secure multiple Domain Names, they can be different to the Domain Names you will specify in the CSR / AutoCSR
0
at $83 each
Add multiple subdomains
Secure subdomains of the Domain Name you will specify in the CSR / AutoCSR
0
at $42 each
Add multiple public IP addresses
Add Public IP Addresses (must be publicly accessible and owned by the applicant organization)
0
at $83 each
Add multiple internal server names or internal IP addresses
Add Internal Addresses such as 10.10.10.01 or localhost
0
at $0 each

USING ONECLICKSSL

OneClickSSL is another GlobalSign innovation – designed to help hosting companies automate the entire SSL workflow, including:

- CSR generation
- Private key generation
- Right to use a domain
- Receipt of issued certificate
- Installation of certificate and installation of intermediate certificates
- Binding of certificate to appropriate website

OneClickSSL plug-ins are available for a number of control panels and web servers, and Voucher provisioning is available through a number of billing platforms. Please visit www.globalsign.com/ssl/oneclickssl for the latest integration news and downloads. For mass deployment of plug-ins in your hosting environment, contact your Account Manager.

TYPES OF ONECLICKSSL VOUCHERS

Single Site Vouchers

Like standard SSL Certificates, Single Site Vouchers are provisioned through Partner Accounts or via the GlobalSign retail sales website. Partners can obtain Vouchers either via the GlobalSign Voucher API or via their web console (GlobalSign Certificate Center or GCC). Single Site Vouchers are tied to a **specific product order for a specific domain** on the GlobalSign system – essentially a product configuration such as a 3 year DomainSSL certificate for www.domain.com. Single Site Vouchers can only be redeemed once – if they are re-entered into the OneClickSSL plug-in, it will reissue the certificate with an unchanged expiration date. Single Site Vouchers are designed to be redeemed by the end customer / server admin.

Supervouchers

Supervouchers are issued by GlobalSign to Partners. Partners cannot create Supervouchers directly. Supervouchers allow a host to reuse the same voucher multiple times – and can be restricted by number of redemptions, time period and platform or permitted IP range. Supervouchers are tied to a **specific partner account for a specific product type and validity period** on the GlobalSign system. Supervouchers are designed to be redeemed on behalf of the end customer / server admin and allow the hosting company to "push" the Voucher to the plug-in, automating the redemption and hence SSL activation. They should not be made public and are best used programmatically or internally by hosting companies.

Trial Vouchers

Trial Vouchers are identical to Supervouchers in terms of provisioning and customizable restrictions but are tied to GlobalSign's trial product range of short term certificate validity periods such as 30 day DomainSSL Certificates.

PAYMENT FOR ONECLICKSSL VOUCHERS

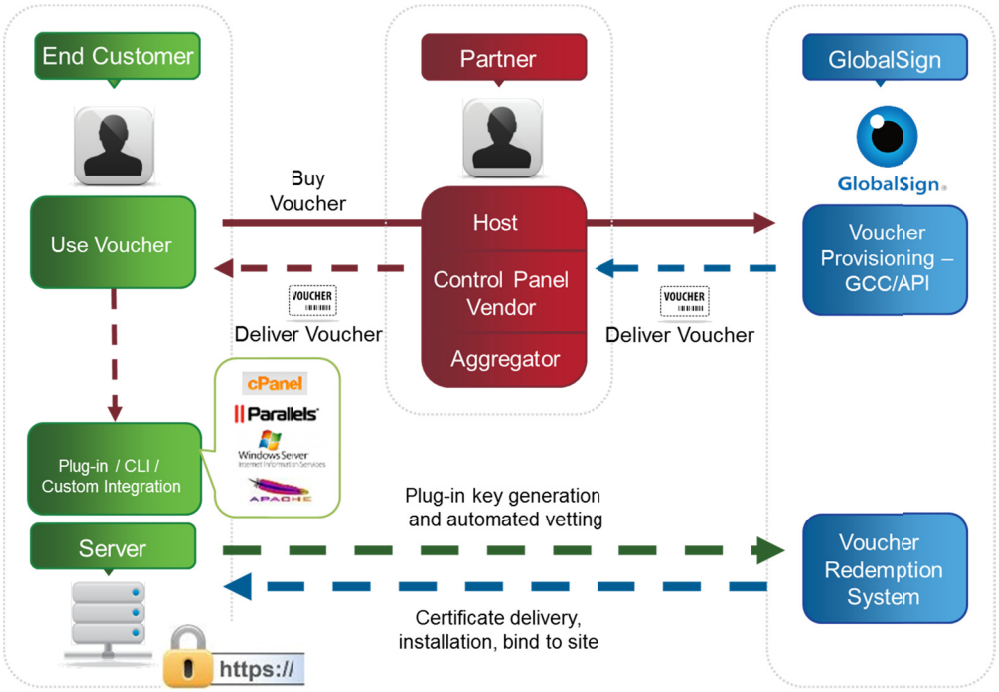
GlobalSign offers many ways for Partners to pay for Vouchers. Typically the cost of the Voucher will depend upon the quantity or deal in place with the Partner. Note there is no fee for the use of Trial Vouchers.

- **Single Site Vouchers**
  - Pay As You Go – a credit card is held on file and charged when a Voucher is issued.
  - Bulk deposit – a deposit into the account is made and debited to the value of the Voucher when a Voucher is issued.
  - Unlimited license contract – for an annual fee, the Partner can issue an unlimited number of Vouchers. Some restrictions may apply.
  - Monthly invoicing – the Partner is invoiced monthly for number of Vouchers issued.

- **Supervouchers**
  - Unlimited license contract – for an annual fee, the Partner can issue an unlimited number of Vouchers. Some restrictions may apply.
  - Monthly invoicing – the Partner is invoiced monthly for number of Vouchers issued.

OBTAINING A ONECLICKSSL SINGLE SITE VOUCHER

For Vouchers provisioned by Partners:



The above diagram shows the concept of a Voucher being applied for via a Partner to GlobalSign either by GCC or by API. The provisioned Voucher is then redeemed at the Control Panel or Server plug-in level.

INITIATE A CERT-INVITE

This method is significantly simplified and requires you to enter only the contact details of the customer. It does not require you to enter their company information or CSR. When you create a Cert-Invite, GlobalSign will generate a unique code specific to the order and give you a PIN. We then send an email to the customer containing a link. You must communicate the PIN to the end user yourself – typically we would suggest doing this once you have received payment from your customer.

You may only create Cert-Invites if you have funds deposited into your account (see section on **Payment Options – Bulk Orders / Depositing Funds into Account > Add Bulk Order / Add Deposit**).

1. Making sure you are on the **SSL for Partners & Retail** Click **New Cert Invite** in the **SSL Certificate Management** section.

2. On the Certificate Application page specify the order details:
   a. In **Products**, select the SSL Certificate type – **AlphaSSL**, **DomainSSL**, **OrganizationSSL** or **ExtendedSSL**.
   b. Specify if the SSL Certificate is to have any wildcard, public IP or Subject Alternative Name (SAN) options.
   c. Specify the validity period – 1-5 years for DomainSSL and OrganizationSSL and 1-2 years for ExtendedSSL.
   d. Specify if you are switching from a competitor or renewing the certificate

3. On the **New Cert-Invite** page specify the Cert-invite recipient details. These are the details of the customer who will be emailed an invitation to complete the SSL Certificate application process. Make sure the customer's email address is in the **Destination Email Address** field.

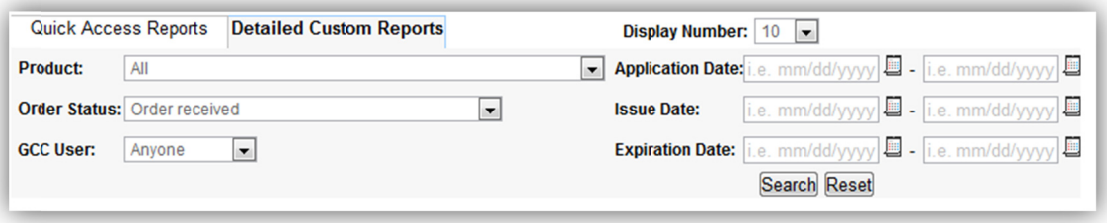
4. Next you will be asked to confirm the application details you provided and review GlobalSign's Subscriber Agreement.

5. Click **Complete** and you will be presented with the PIN associated with that Cert-Invite application. Make sure your customer is given this to be able to proceed with the application.

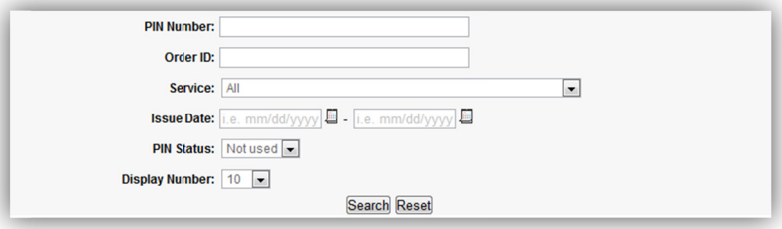
MANAGING EXISTING CUSTOMERS: SSL CERTIFICATE APPLICATIONS

VIEWING OUTSTANDING & COMPLETED ORDERS

1. Click **Order History & Certificate Renewals** in the **SSL Certificate Management** section to run reports or search for specific orders. From this page you can choose from several pre-configured reports (e.g., Upcoming Renewals, Incomplete Orders) on the **Quick Access Reports** tab or you can click the **Detailed Custom Reports** tab to run reports with more advanced filters. To run a report based on Order Status you will need to use the **Detailed Custom Reports** tab.
2. Click the **Detailed Custom Reports** tab and use the **Order Status** dropdown to select the Order Status you want to use as a filter.
3. Click the **Search** button. A list of certificates with the selected Order Status will appear at the bottom of your screen.


Quick Access Reports
Detailed Custom Reports
Display Number: 10
Product: All
Application Date: i.e. mm/dd/yyyy - i.e. mm/dd/yyyy
Order Status: Order received
Issue Date: i.e. mm/dd/yyyy - i.e. mm/dd/yyyy
GCC User: Anyone
Expiration Date: i.e. mm/dd/yyyy - i.e. mm/dd/yyyy
Search Reset

For Cert-Invite applications **Cert Invite Management** in the **SSL Certificate Management** section. This page allows you to search for Cert-Invites given certain criteria.



CANCELLING A CERT-INVITE PIN

If you wish to cancel a Cert-Invite PIN click **Cert Invite Management** and search for the order. Click the **Edit** button next to appropriate Cert-Invite application and change the PIN Status from **Unused** to **Void**. Click the **Confirm** button and then the **Complete** button to commit the change. Note: Once a Cert-Invite PIN is voided it cannot be reactivated. You will not be charged for voiding any Cert-Invite PINs.

CANCELLING AN ORDER

If you wish to cancel a completed order you may do so automatically within the 7 day refund period. Depending on how you paid for the certificate, cancelled orders automatically refund the appropriate amount of credit to deposit accounts, directly refund credit cards or cancel outstanding invoices. To cancel an order:

1. Click **Order History & Certificate Renewals** in the **SSL Certificate Management** section.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Cancel Order** button at the very top or very button of your screen.
4. Review the order details to verify the order is the correct application to cancel, scroll to the bottom of the page and click the **Confirm** button.

RESENDING AN APPROVER EMAIL

If your customer has not received the Approver Email or has deleted / spam filtered the email by mistake, you can automatically resend the Approver Email.

1. Click **Order History & Certificate Renewals** under **SSL Certificate Management**.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Resend Approval Mail** button located at the very top and very bottom of the screen.

4. Confirm that the Approval Email address is correct and click the **Resend** button.

If your customer cannot receive the approver email at the address selected during the application, contact GlobalSign Support.

REISSUING AN SSL CERTIFICATE

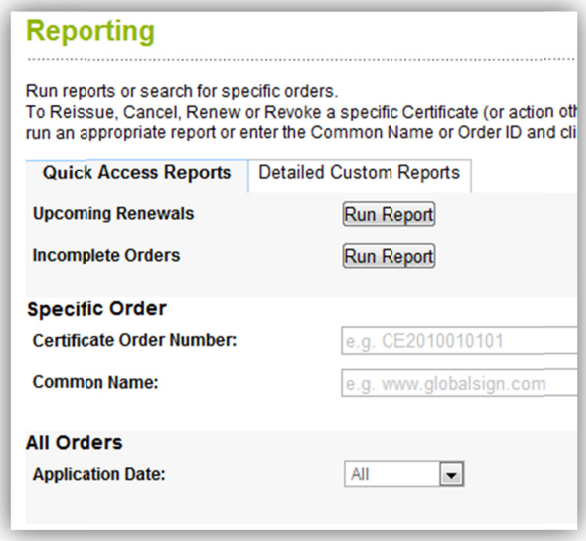
If your customer needs a certificate reissued because they have deleted or lost their certificate and corresponding Private Key, you can reissue any issued certificates directly.

1. Click **Order History & Certificate Renewals** under **SSL Certificate Management**.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Reissue** button located at the very top or very bottom of the page.
4. You will be prompted for a new Certificate Signing Request. Note: the reissued certificate will only be valid for the period remaining on the initial certificate.

RENEWING AN SSL CERTIFICATE

GlobalSign will begin sending Renewal Notices 90 days prior to the expiration of the certificate. We will send the notices to the contact associated with the order – which by default will be one of the Users associated with the Partner account, or if specified during the application, the end customers themselves.

For added convenience, certificates within the renewal range (90 days prior to expiration) will be listed on the home screen of the **SSL for Partners & Retail** tab. Simply click the Renew button next to the appropriate order to begin the renewal process. You can also view upcoming Renewals by going to the **Order History & Upcoming Renewals** link and running the **Upcoming Renewals** report on the **Quick Access Reports** tab.



If you renew a customer's certificate before it expires, we will add any remaining time onto the new certificate and give you the option of an extra 30 days free.

REVOKING AN SSL OR CLIENT CERTIFICATE

Revocation should only be used when key material (private key) has been compromised and the identity of the certificate holder could be stolen. Lost certificates need not be revoked. Revocation will add the serial number of the certificate to the GlobalSign Certificate Revocation Lists (CRLs), and such lists are downloaded by browsers and applications to warn users about the revocation of the certificate if they encounter it – for example, a signed email or document, or a https session with a website.

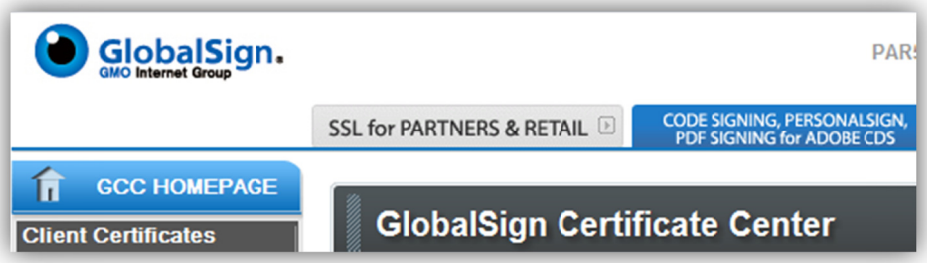
Revoking a certificate cannot be undone. Speak to GlobalSign for advice if you are unsure.

- To revoke an SSL Certificate, log into your Partner account, locate the order via the Reporting facility, click Edit, and click Revoke.
- To revoke a Client Certificate you must contact GlobalSign. Partners are not permitted to directly revoke Client Certificates. GlobalSign will need to ascertain the reason for revocation with the end customer directly and document their confirmed approval to revoke.

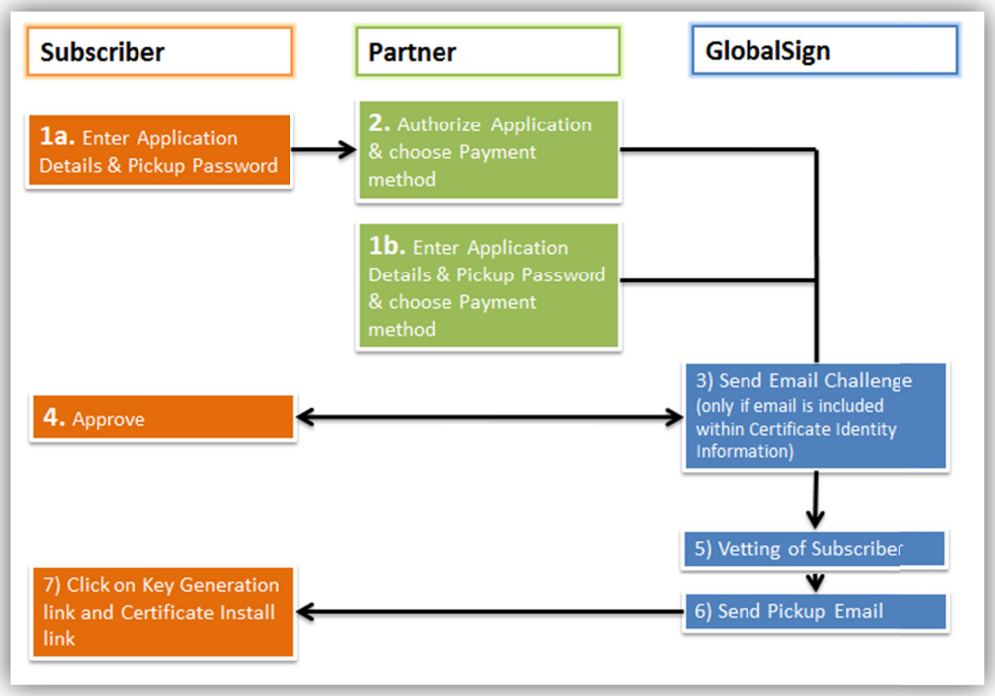
ORDERING CLIENT CERTIFICATES

Partners have two methods of ordering Client Certificates through their GCC account – the Partner completes the application on behalf of the customer, or the customer completes his/her own application.

Make sure that you are in the **Client Certificates** section by clicking the **Code Signing, PersonalSign, PDF Signing for Adobe CDS** tab on your GCC landing page:



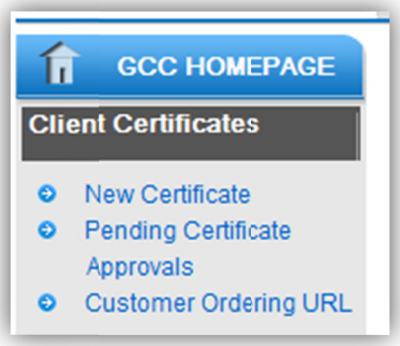
Before placing an order, or allowing your customers to place an order, please be familiar with the ordering process as detailed below:


Subscriber
Partner
GlobalSign
1a. Enter Application Details & Pickup Password
2. Authorize Application & choose Payment method
1b. Enter Application Details & Pickup Password & choose Payment method
3) Send Email Challenge (only if email is included within Certificate Identity Information)
4. Approve
5) Vetting of Subscriber
6) Send Pickup Email
7) Click on Key Generation link and Certificate Install link

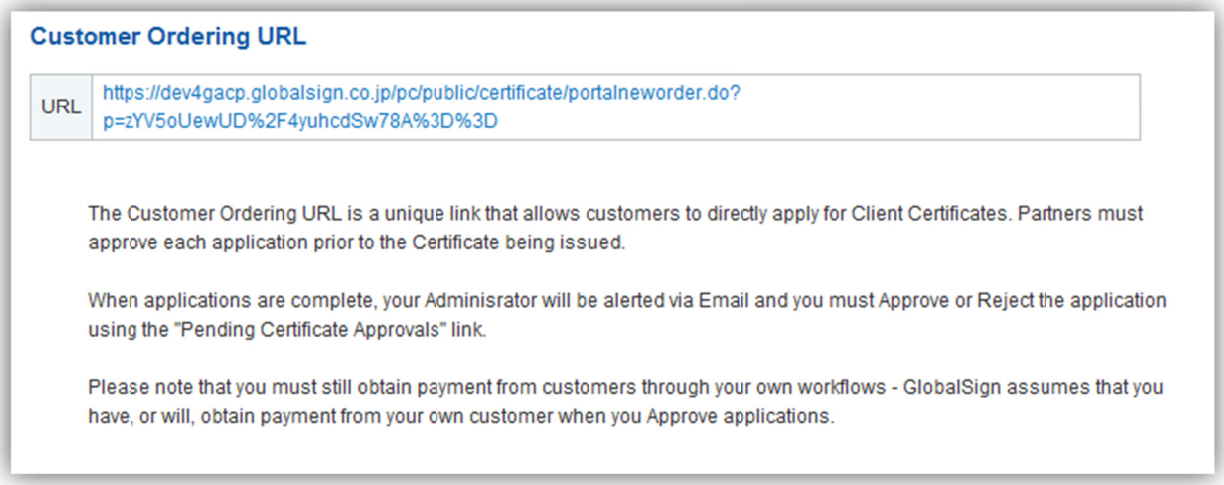
1A) METHOD – ALLOWING CUSTOMERS TO ORDER DIRECTLY

This method allows your customers to place an order through your Account directly via a unique ordering URL. They do not need login access and may only complete the web ordering forms. Partners must then authorize the order prior to GlobalSign initiating vetting of the order, and ultimately releasing the issued certificate to the customer.

1. Share the **Customer Ordering URL** with your customers, either directly or hooked into your web pages. You can obtain your unique URL by clicking on the Customer Ordering URL within the Client Certificates section of your GCC account (located on the Code Signing, PersonalSign, PDF Signing for Adobe CDS tab).



A brief explanation of usage and the actual URL will be displayed:


Customer Ordering URL
URL
https://dev4gacp.globalsign.co.jp/pc/public/certificate/portalneworder.do?p=zYV5oUewUD%2F4yuhcdSw78A%3D%3D
The Customer Ordering URL is a unique link that allows customers to directly apply for Client Certificates. Partners must approve each application prior to the Certificate being issued.
When applications are complete, your Adminisrator will be alerted via Email and you must Approve or Reject the application using the "Pending Certificate Approvals" link.
Please note that you must still obtain payment from customers through your own workflows - GlobalSign assumes that you have, or will, obtain payment from your own customer when you Approve applications.

When a customer clicks on the Ordering URL they will enter the below application process:

1. On the certificate type selection page select the Client Certificate type – PersonalSign, Code Signing or PDF Signing Certificate.

2. They will then enter the application flow the specific product type. For this example we will follow the application flow for Code Signing:
    a. Select the validity period**, 1-3 years**. No pricing will be displayed unlike when you apply on their behalf.
    b. Select if the customer has an **externally generated CSR**. This is very rare and in most cases, they should leave this blank. Please note this option is only available when ordering CodeSigning for Multi-platforms.
    c. Select if the customer wishes to use the **PKCS#12** option. This option tells GlobalSign to generate the cryptographic key pair on the customer's behalf. This avoids having to use the browser to generate the key pair later in the process, or if your customer is having browser issues.

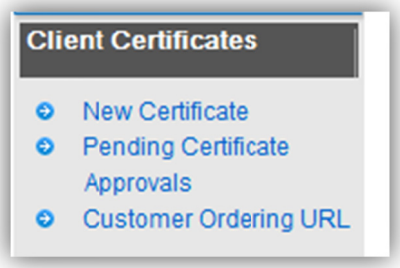
3. Enter the **Certificate Identity Details**. These details will be vetted. They must be the Subscriber's (end customer to whom GlobalSign issues the certificate). This is the information that will be included in the Certificate.
    a. Complete the identity details.
    b. **Remember the pickup password.** If the password is lost or forgotten, the application must be made again from the beginning.

4. Enter the **Subscriber Details**. The Subscriber is the person or organization to which the certificate will be issued. These details will be needed for vetting and possibly authorization purposes.

5. Confirm the application details and review the Subscriber Agreement.

You, as the Partner, will be alerted via email when a new order has been placed. You must now complete the following:

1. Log into your GCC account and go to the **Code Signing, PersonalSign, PDF Signing for Adobe CDS** tab.
2. Click on **Pending Certificate Approvals**.



3. Select the order, choose to Approve or Reject.
    a. If you reject, the application will be cancelled.
    b. If you accept, you will be taken to the payment selection method.

4. Choose your payment method:

    a. **Deposit** – the fee for the Certificate will be deducted from your Deposit balance (see the Payment Options – Bulk Orders / Depositing Funds into Account section of this Quick Start Guide).

    Alternatively you may use one of the Pay As You Go payment methods (see the Payment Options – Pay As You Go section of this Quick Start Guide):

    a. **Bank Transfer**
        i. **Payment in Advance**: Select for an invoice to automatically appear in the **Accounting / Billing > View / Request Invoices** section that can be printed and submitted to your purchasing department. GlobalSign will only issue the Certificate once the funds are transferred by your purchasing department directly to the GlobalSign bank account.
        ii. **Payment in Arrears**: Select to request the deposit amount funds are settled within the standard payment terms. At the end of the calendar month an invoice will automatically appear in the **Accounting / Billing** > **View / Request Invoices** section. Once you have settled the invoice your credit limit will return to the previous limit level.

    b. **Credit Card** – you will be asked to provide credit card details to be charged before the Certificate can be issued. The credit card is charged automatically at the point of issuance.

    Note: depending on your territory and account type, not all payment types will be available.

1B) METHOD - ORDERING ON BEHALF OF A CUSTOMER

This method requires the Partner to complete the required web forms on behalf of the customer.

1. While on the **Code Signing, PersonalSign, PDF Signing for Adobe CDS** tab, click **New Certificate** in the **Client Certificates** section of the left navigation menu.

2. On the Certificate Type selection page select the Client Certificate type – PersonalSign, Code Signing or PDF Signing Certificate.

3. You will then enter the application flow the specific product type. For this example we will follow the application flow for Code Signing:
    a. Select the validity period, **1-3 years**.
    b. If you have any promotional codes from GlobalSign, enter them here.
    c. Select if the customer has provided you with an **externally generated CSR**. This is very rare and in most cases, you should leave this blank. Please note this option is only available when ordering Code Signing for Multi-platforms.
    d. Select if you wish to use the **PKCS#12** option. This option tells GlobalSign to generate the cryptographic key pair on your customer's behalf. This avoids having to use the browser to generate the key pair later in the process, or if your customer is having browser issues.

4. Enter the **Certificate Identity Details**. These details will be vetted. They must be the Subscriber's (end customer to whom GlobalSign issues the certificate). This is the information that will be included in the Certificate.
    a. Complete the identity details.
    b. **Remember the pickup password.** This must be communicated by the Partner to the Subscriber out of bands (i.e. GlobalSign will never communicate this password to anyone, Partner or Subscriber). If the password is lost or forgotten, the application must be made again from the beginning.

5. Enter the **Subscriber Details**. The Subscriber is the person or organization to which the certificate will be issued. These details will be needed for vetting and possibly authorization purposes.

6. Choose your payment method:

    a. **Deposit** – the fee for the certificate will be deducted from your Deposit balance (see the Payment Options – Bulk Orders / Depositing Funds into Account section of this Quick Start Guide).

    Alternatively you may use one of the Pay As You Go payment methods (see the Payment Options – Pay As You Go section of this Quick Start Guide):

    b. **Bank Transfer**
        i. **Payment in Advance**: Select for an invoice to automatically appear in the **Accounting / Billing > View / Request Invoices** section that can be printed and submitted to your purchasing department. GlobalSign will only issue the certificate once the funds are transferred by your purchasing department directly to the GlobalSign bank account.
        ii. **Payment in Arrears**: Select to request the deposit amount funds are settled within the standard payment terms. At the end of the calendar month an invoice will automatically appear in the **Accounting / Billing** > **View / Request Invoices** section. Once you have settled the invoice your credit limit will return to the previous limit level.

    c. **Credit Card** – you will be asked to provide credit card details to be charged before the certificate can be issued. The credit card is charged automatically at the point of issuance.

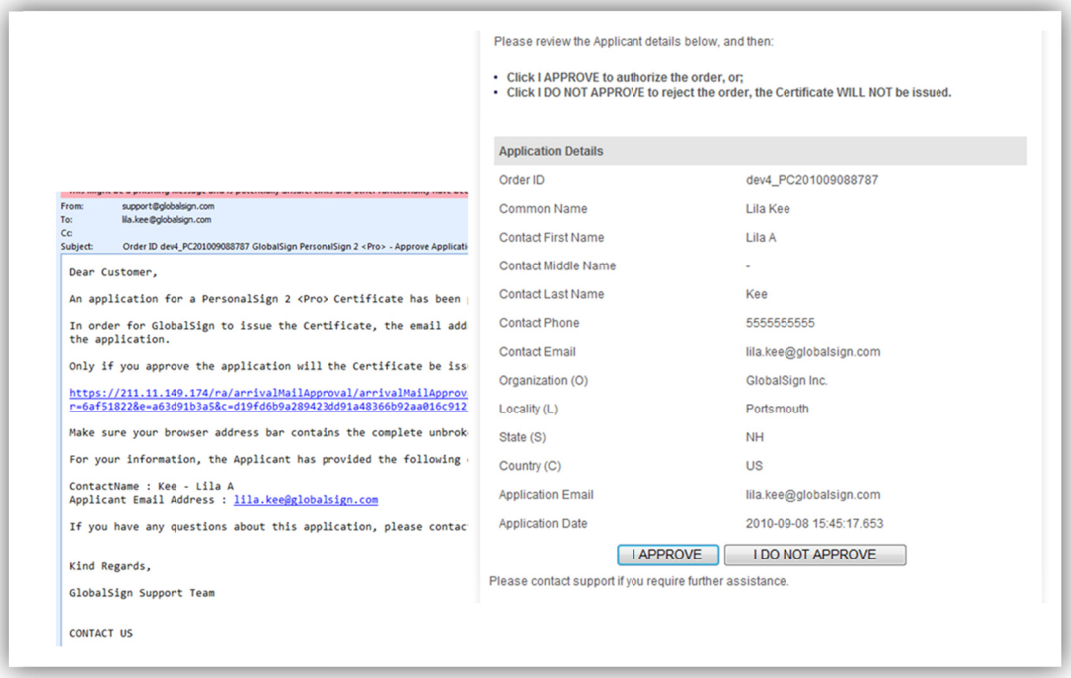
    Note: depending on your territory and account type, not all payment types will be available.

7. Confirm the application details. The customer's email address you included in the application will receive an email the application has been placed.

8. Once the information included in the application has been verified by our Vetting Team, an email will be sent to the email address you included in the application with instructions for picking up the certificate.

ESSENTIAL WORKFLOW POINTS TO NOTE

- If an email address has been entered into the Certificate Identity Details section, GlobalSign will send an Approval Email to the email address entered. Unless the Applicant approves the order, the order will not be processed. Clicking the link in the email will open an Approve Application web page containing an Approve or Reject button:


From: support@globalsign.com
To: lila.kee@globalsign.com
Cc:
Subject: Order ID dev4_PC201009088787 GlobalSign PersonalSign 2 <Pro> - Approve Applicati
Dear Customer,
An application for a PersonalSign 2 <Pro> Certificate has been
In order for GlobalSign to issue the Certificate, the email add
the application.
Only if you approve the application will the Certificate be iss
https://211.11.149.174/ra/arrivalMailApproval/arrivalMailApprov
r=6af51822&e=a63d91b3a5&c=d19fd6b9a289423dd91a48366b92aa016c912
Make sure your browser address bar contains the complete unbrok
For your information, the Applicant has provided the following
ContactName : Kee - Lila A
Applicant Email Address : lila.kee@globalsign.com
If you have any questions about this application, please contac
Kind Regards,
GlobalSign Support Team
CONTACT US
Please review the Applicant details below, and then:
Click I APPROVE to authorize the order, or;
Click I DO NOT APPROVE to reject the order, the Certificate WILL NOT be issued.
Application Details
Order ID dev4_PC201009088787
Common Name Lila Kee
Contact First Name Lila A
Contact Middle Name -
Contact Last Name Kee
Contact Phone 5555555555
Contact Email lila.kee@globalsign.com
Organization (O) GlobalSign Inc.
Locality (L) Portsmouth
State (S) NH
Country (C) US
Application Email lila.kee@globalsign.com
Application Date 2010-09-08 15:45:17.653
I APPROVE
I DO NOT APPROVE
Please contact support if you require further assistance.

- If the Client Certificate requires vetting, such as PersonalSign 2, PersonalSign 2 Pro, PersonalSign 2 Department, Code Signing or any of the PDF Signing Certificate products, the certificate will not be released for pickup until vetting is complete. GlobalSign will automatically send a Pickup Email to the Subscriber when the certificate application has been vetted.

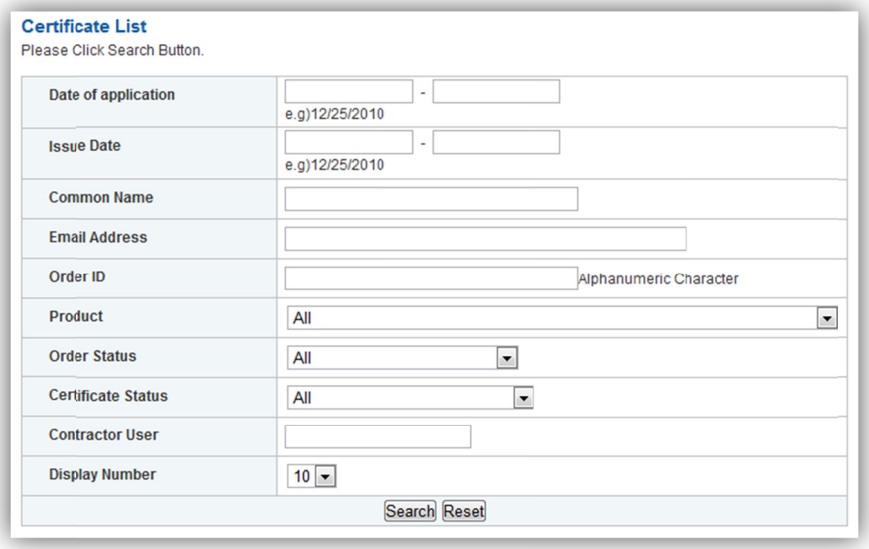
- The certificate is issued when the certificate pickup link, contained within the Pickup Email is followed, and the Pickup Password is entered into the page.

MANAGING EXISTING CUSTOMERS: CLIENT CERTIFICATE APPLICATIONS

VIEWING OUTSTANDING & COMPLETED ORDERS

While on the **Code Signing, PersonalSign, PDF Signing for Adobe CDS tab in your GCC account,** click **Order History** in the **Reporting** section to open the search function for viewing all certificate applications. Use the Order Status dropdown to

select the Order Status you want to use as a filter (e.g., Use the Order Status "Issue Completed" to view all completed and issued orders.



CANCELLING AN ORDER

If you wish to cancel a completed order you may do so automatically within the 7 day refund period. Depending on how you paid for the certificate, cancelled orders automatically refund the appropriate amount of credit to deposit accounts, directly refund credit cards or cancel outstanding invoices. To cancel an order:

1. While on the **Code Signing, PersonalSign, PDF Signing for Adobe CDS tab in your GCC account,** click **Order History** under **Reporting**.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Cancellation Request** button located at both the very top and very bottom of the **Certificate Edit** screen.
4. Check the order is the correct application to cancel, scroll to the bottom of the page and click the **Confirm** button.

RESENDING AN APPROVER EMAIL FOR APPROPRIATE CLIENT CERTIFICATES

If your customer has not received the Approver Email or has deleted / spam filtered the email by mistake, you can automatically resend the Approver Email.

1. While on the **Code Signing, PersonalSign, PDF Signing for Adobe CDS tab in your GCC account,** click **Order History** under **Reporting**.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Resend Approval Mail** button located at both the very top and very bottom of the **Certificate Edit** screen.
4. Check the order is the correct application to resend the Approver email, scroll to the bottom of the page again and click the **Complete** button.

If your customer cannot receive the approver email at the address selected during the application, contact GlobalSign Support.

REISSUING A CLIENT CERTIFICATE

If your customer needs a certificate reissued because they have deleted or lost their certificate and corresponding Private Key, you can initiate a reissue for any issued certificates directly.

1. While on the **Code Signing, PersonalSign, PDF Signing for Adobe CDS tab in your GCC account,** click **Order History** under **Reporting**.
2. Search for the appropriate order and click the **Edit** button.
3. Click the **Reissue** button located at the very top and very bottom of the **Certificate Edit** screen.
4. A new pickup link will be sent to the Subscriber.

RENEWING A CLIENT CERTIFICATE

GlobalSign will begin sending Renewal Notices 90 days prior to the expiration of the certificate. We will send the notices to the contact associated with the order – which by default will be one of the Users associated with the Partner account, or if specified during the application, the end customer themselves.

For added convenience, certificates within the renewal range (90 days prior to expiration) will be listed on the home screen of the **Code Signing, PersonalSign, PDF Signing for CDS** tab. Simply click the **Renew** button next to the appropriate order to begin the renewal process. You can also renew certificates by going to **Order History** under the **Reporting** section, searching for the appropriate order, and clicking on the Renew button.

If you renew a customer's certificate before it expires, we will add any remaining time onto the new certificate and give you the option of an extra 30 days free.

ACCOUNT WIDE FUNCTIONS

CREATING / MANAGING USERS

USER ROLES

You may add additional Users to your GCC account. Depending on their privileges newly created Users may place new certificate orders, add Deposit funds, or perform reporting. Users are defined in roles:

- **Account Administrator**: Users who are the top level account owner can see all menus, perform all functions and have the ability to create new Managers and Staff in Charge.
- **Manager**: Users who have their administration rights defined by the Account Administrator and can create Staff in Charge.
- **Staff in Charge**: Users who have their administration rights defined by the Account Administrator or the Manager. Unlike Account Administrators and Managers, Staff in Charge cannot create additional Users.

CREATING NEW USERS AND UNDERSTANDING USER ADMINISTRATION RIGHTS

To add a new User click **Manage Users** under **Account Management**. Click **New Registration**. Complete the details of the new User and select their role by selecting either **Manager** or **Staff in Charge** in the User Permissions. Set their privileges as follows:

- **Certificate Approval Permission**
  - Set to **True** if you wish the User to be able to place orders that do not need approval and approve certificate orders placed by other Users who do not have Certificate Approval Permission.
  - Set to **False** if the User should not have approval permission, nor should be allowed to place certificate orders without the order being approved. Certificate orders that are placed by Users who do not have Certificate Approval Permission will be placed into the **Pending Certificate Approvals** section under **Certificate Management**.

  Note: all users can place orders; only users with Certificate Approval Permission can place orders that do not need to be approved by users with Certificate Approval Permission.

- **Deposit Purchase Authority**
  - Set to **True** if you wish the User to be able to deposit funds into the account.
  - Set to **False** if you do not wish the User to be able to deposit funds into the account.

GLOBALSIGN SSL API

Contact your Account Manager for further details on how to use the GlobalSign SSL APIs and web services. The XML based API allows you to place orders and reports on issued certificates. The API may be integrated into websites, control panels and third party web services and replaces the need for partners to conduct all SSL reselling through GCC. The AJAX API allows you to run a web based app to automate the application of SSL Certificates.

CREATING SECOND TIER SUB-RESELLERS

GlobalSign Partners can create and manage their own set of second tier sub-resellers (SSL only) – allowing a multi-level reseller chain. You can sign up, set pricing, manage and report on your own sub-resellers – giving them all the benefits you enjoy through partnering with GlobalSign. For further details on creating Sub-Resellers, contact your Account Manager.

GETTING HELP

Every GlobalSign Partner has a dedicated Account Manager who is on hand to help with any commercial and technical queries you may have about reselling SSL. GlobalSign also provides technical support through our Client Service departments around the world. www.globalsign.com/support

GlobalSign Americas Tel: 1-877-775-4562 www.globalsign.com sales-us@globalsign.com	**GlobalSign EU** Tel: +32 16 891900 www.globalsign.eu sales@globalsign.com	**GlobalSign UK** Tel: +44 1622 766766 www.globalsign.co.uk sales@globalsign.com
GlobalSign FR Tel: +33 1 82 88 01 24 www.globalsign.fr ventes@globalsign.com	**GlobalSign DE** Tel: +49 30 8878 9310 www.globalsign.de verkauf@globalsign.com	**GlobalSign NL** Tel: +31 20 8908021 www.globalsign.nl verkoop@globalsign.com